



Internal Administrators can also manage functions available to users with the Organization Administrator role (Department/Approval/Users, Document Settings, System Configuration, Maintenance Tables).




Maintain Department/Approval/Users

Organization Administrator Home


[Department/Approval/Users](#)
[Document Settings](#)
[System Configuration](#)
[Maintenance Tables](#)
[Dashboard](#)




Maintain Agency
Organizations/Departments/Locations
This section is used to administer agency organization, department and location information




Configure Approval Settings
This section is used to configure system settings for approval path maintenance




Maintain Agency Approval Paths
This section is used to administer agency approval paths




Maintain Agency Users
This section is used to maintain agency users



Migrate Existing BuySpeed Agency Users
This section is used to enable existing BuySpeed users to use BuySpeed Online



Maintain Assignment of Commodity Codes to Purchasers
This section is used to administer the association of purchasers with commodity codes



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The Maintain Department, Approval and Users tab is used for setting up Organizations, Departments, Addresses and Locations. The tab also sets up how approval paths should work along with who the approvers are.

The final section is the setup and maintenance of the user profiles.

Maintain Agency Orgs/Depts/Locations

Agency Organization Administrator Home

Maintain Agency Organizations
This section is used to administer agency organizations

Maintain Organization Departments
This section is used to maintain organization departments

Exit

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Maintain Organization

Organization ID	Organization Name	Fiscal Year Start	Fiscal Year End	Fiscal Year Roll Days	Print Logo Path	Inherit Asset Template	Status
<u>AGENCY</u>	Department of Technology Management and Budget	10/01/2012	09/30/2013	14	images\AGENCY\DTMB.gif	No	Active

Exit

An Organization in Buy4Michigan Online is comprised of Organizations>Departments>Locations in that order.

This is where an administrator would add and maintain organization, department and location information. An organization is similar to a sub-agency and has departments and locations attached to it. Click on the name of the organization to maintain it.



Maintain Organizations

GeneralAccount Interface

Organization ID:

AGENCY

Organization Name*:

Department of Technology Management and Budget

Organization Label*:

Default Type

Fiscal Year Start (MM/DD/YYYY)*:

10/01/2012


Fiscal Year End (MM/DD/YYYY)*:

09/30/2013

Fiscal Year Roll Days:

14

Alternate ID:



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The organization is the highest level in the Buy4Michigan hierarchy.

Organization ID – 4 character ID. Once saved, cannot be changed

Organization Name – Name of the Organization

Fiscal Year Start and End – The dates for the Fiscal Year which will affect documents and accounting

FY Roll Days – This determines when users may start to build documents for the next fiscal year and the amount of time after FY roll to complete the previous year.



Maintain Organizations

Print Logo

Status:

Address 1*:

Address 2:

Address 3:

Address 4:

City*:

Agency Phone:

Agency FAX:

Agency URL:

images/AGENCY/DTMB.gif

Active

Contract Connect - DTMB Procurement

2nd Floor, Mason Building


PO BOX 30026

Lansing State : Zip :

517 335 0230

<http://www.michigan.gov/micontractconnect>

Agency URL Example: "<http://www.buyspeed.com>"



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Print Logo – The logo for the organization

Status – Active or Inactive. Inactive means anything associated with the Organization can no longer be used.


Address Fields – Address of the Organization

Agency Phone – Contact phone number

Agency Fax – Contact fax number

Agency URL – The url to the agency's web site.

Maintain Organizations

☐ Use parent organization configuration settings.
☐ Limit account access for Department Access users (If checked, Department Access users can only access accounts based on department/location privileges.)
☐ Limit document access for Department Access users (If checked, Department Access users can only access documents based on department/location privileges.)
☐ Limit Solicitation access for external users (If checked, all Solicitations associated to this Organization will be filtered out of external searches.)
☐ Limit Contract access for external users (If checked, all Contracts associated to this Organization will be filtered out of external searches.)
☒ Restrict Department Access users from publishing Informal Bids to Web.
☒ Restrict Inventory users from publishing Informal Quotes to Web.
 P-Card Bill-to Address 

- Use parent organization configuration settings - When selected, the new “child” organization will default settings, e.g., fiscal year begin and end dates and other settings from the “parent” organization.
- Limit Account Access for DA Users – If checked, the DA user can only see and use account codes authorized for their department.
- Limit Document Access for DA Users – If checked, the DA user can only see documents for their department.
- Limited Solicitation Access - If checked, solicitations associated with this organization will be filtered out of external searches (e.g., Open Bids).
- Restrict DA or Inventory users from publishing Informal Bids and Quotes – If checked, a DA user cannot use the requisition informal bid functionality.
- P-Card Bill To Address – If using P-Card support, the default bill to.

Maintain Departments

Department Maintenance

Department ID	Department Name	Organization	Status
TEST01	Test Department For Install Do Not Establish in Production	AGENCY - Department of Technology Management and Budget	Active

Add Department
Exit

Department Information

Department ID: TEST01

Department Name*: Test Department For Inst:

Allow Manual Override Encumbrance # ☐

Alternate ID

Organization: AGENCY - Department of Technology Management and Budget

Status: Active

Auto Encumbrance # Prefix

Limit Solicitation access for external users (If checked, all Solicitations associated to this Organization will be filtered out of external searches.) ☐

Limit Contract access for external users (If checked, all Contracts associated to this Organization will be filtered out of external searches.) ☐

Save & Exit
Save & Continue
Reset

- To add or edit a department, click Maintain Organization Departments.
- Select the Add Department button at the bottom of the list, or click on the department you want to edit.
- Department ID – Up to 5 characters
- Organization – Organization the department belongs to
- Department name – Official name for the department
- Status – Active or Inactive. If inactive, department cannot be used on documents.
- Limit Solicitation Access - If checked, solicitations associated with this department will be filtered out of external searches (e.g., Open Bids).
- Limit Contract Access - If checked, contract associated with this department will be filtered out of external searches (e.g., Active Contracts).

Maintain Addresses

Maintain Department Address

Department: CD - Community Development Division

Department Suffix ID: 1

Department Suffix Name: Community Development Division

Status: Active

Address Information (Copy from a Department Address)

Contact Name*

Address Line 1* John H Mulroy Civic Center 11th Floor

Address Line 2 421 Montgomery Street

Address Line 3

Address Line 4

Country*

City* Syracuse State/Province* NY

ZIP* 13202

County

Phone* 315 435 3558 Ext

FAX 315 435 3794 Email*

Toll Free

Save & Exit

Save & Continue

Reset


Cancel & Exit

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For each department, establish all valid bill-to or ship-to addresses. These addresses can be selected by users when building requisitions, bids, or POs.

You can type address information, or use existing address information by clicking on the lookup (eyeglass) button.


Enter all valid information for that address, and save as appropriate.



Maintain Locations

Maintain Location

Location ID:	145	Department:	CD - Community Development Division
Location Name:	Community Dev.	Status:	Active
Location Type:	Department Access	Purchaser:	
Ship-to Department Address:	CD - Community Development Division / 1 - Community Development D John H Mulroy Civic Center 11th Floor 421 Montgomery Street Syracuse, NY 13202 Phone: (315)435-3553 FAX: (315)435-3794		
Bill-to Department Address:	CD - Community Development Division / 1 - Community Development D John H Mulroy Civic Center 11th Floor 421 Montgomery Street Syracuse, NY 13202 Phone: (315)435-3553 FAX: (315)435-3794		
Use the account filter to limit account selection for department access users.			
Account Filter:		Email-to:	
<input checked="" type="checkbox"/> Allow Requisition		<input type="checkbox"/> Allow Bid/Quote	
<input type="checkbox"/> Allow Open Market PO		Open Market PO Dollar Limit:	0
<input type="checkbox"/> Allow Contract PO Releases		<input checked="" type="checkbox"/> Allow Blanket PO Releases	
<input checked="" type="checkbox"/> Allow PO Receipt Variance		PO Receipt Quantity Variance Percentage: (0.0% means no limit)	100.0%
<input checked="" type="checkbox"/> Req Required		PO Receipt Dollar Variance: (\$0.00 means no limit)	0.00
<input checked="" type="checkbox"/> Add Ship-to Address Allowed		<input checked="" type="checkbox"/> Auto Log off	
<input type="checkbox"/> Manual PO #s		<input checked="" type="checkbox"/> Specify Purchaser Allowed	



Save & Exit
 Save & Continue
 Reset
 Exit

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To add a location to a department, you must first select (or create) the department.

This will bring up a department maintenance screen which will show the department's information, plus any locations that have been created for this department.

The upper half of the screen contains information regarding the location (ID, Name, Ship-to and Bill-to addresses, etc.) the lower half has the location's configuration settings.

NOTE: Some of the configuration settings are no longer applicable to Buy4Michigan; the areas that can be set are Specify Purchaser Allowed, PO Receipt Quantity Variance Percentage and PO Receipt Dollar Variance

Configure Approval Settings

Administer System Settings for Approval Path



Configure System Approval Settings
This section is used to configure system approval settings.

Maintain Approval Type Sequence

This section is used to maintain approval type sequence to allow the system to prioritize approval paths in the event of auto cascading approvals.



Exit

Buy4Michigan

Configure System Approval Settings

Maintain Organization Approval Setting for: Department of Technology Management and Budget

Organization	AGENCY - Department of Technology Management and Budget
Cascade Setting	Non-Auto Cascading ▼
Allow NIGP Code Approval	<input checked="" type="checkbox"/>
Allow Account Code Segment Approval	<input type="checkbox"/>

Save & Exit Save & Continue Reset Cancel & Exit

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Organization – The selected organization’s settings will be displayed.

Cascade Setting:

No Cascading – You will be able to select from only one specified approval paths.

Non-Auto Cascading – You will be able to select from any and all specified approval paths.

Auto Cascading – Buy4Michigan will implement cascading automatically. You will not see, or be able to select specific approval paths.

Allow NIGP Code Approval

Allows approval paths based on NIGP code.

Allow Account Code Segment Approval

If account codes are configured to “Modular” approvals can be based on parts of the account code.

Maintain Approval Type Sequence

Maintain Organization Approval Types for: Department of Technology Management and Budget

Organization: AGENCY - Department of Technology Management and Budget

Approve Type ID	Description	Priority	Status	Delete
new: <input type="text"/>	<input type="text"/>	<input type="text"/>	Active ▼	<input type="checkbox"/>
BUDGET	Budget office Approval	2	Active ▼	View Related
DEPT	Dept Approval	1	Active ▼	<input type="checkbox"/>

i You cannot delete an approval type if there is an approval path associated with it.
Neither can you deactivate an approval type if there is an active approval path associated with it.

Save & Exit Save & Continue Reset Cancel & Exit

Maintain Approval Type Sequence

When approval paths are created they must be placed in a sequence of priority. Rather than set this priority manually for each approval path, you will be able to create approval Types and assign the priority to the Type and then assign the Type to each path. Select Maintain Approval Type Sequence and Maintain Approval Types will be displayed.

- Approval Type ID Alphanumeric ID. Once set it cannot be changed.
- Description - A more descriptive definition for the type
- Priority - A numeric ordering sequence for priority: lower numbers are earlier in the flow, higher numbers later in the flow.
- Status - Active, Deleted, Inactive, Pending
- View Related - View all approval paths that have been created from this Type.



Maintain Approval Paths

Approval Path PROC - Procurement

[General](#)
[Change Order](#)
[Misc/Freight](#)
[Department/Location](#)
[Email](#)
[NIGP Code](#)
[Vendor](#)
[Summary](#)

General Information

Approval Path ID:	PROC	Description:	Procurement	Organization:	AGENCY - Department of Technology Management and Budget
Approval Type:	BUDGET - Budget office Approval	Dollar Range:	\$0.00 to \$999,999,999.00	Roles:	Basic Purchasing
Status:	Inactive				
Send Email:	Yes	Customize Email Content:	No		
Doc Types (Doc Sub Types):	Purchase Order				

Approvers

Approver User	Level	Type
Shashank Rao	1	Primary
Eric Jacobsen	1	Alternate

Change Order

No specific Change Order criteria were specified for this Approval Path therefore this approval path if associated with PO Change Orders will be active for any PO Change Orders regardless of dollar amount or percentage change.

Misc/Freight

No Misc/Freight options have been set

Approval Departments/Locations

No threshold was specified for the Miscellaneous or Freight Charges for this the Invoice Approval Path therefore this approval path will be attached to any invoice that meets the other criteria and has any Miscellaneous or Freight Charges.

Approval NIGP Codes

No specific NIGP class/class item found for this approval path, therefore the approval path is considered to be associated with all the NIGP class/class item codes.

Vendors

No vendors have been selected

[Add New Approval Path](#)
[Clone Approval Path](#)
[Print](#)
[Exit](#)



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Agency Approval Paths are preset paths for documents that require approvals based on a variety of criteria (such as: account code, department, item's NIGP code, etc.)

Each approval path is setup individually and automatically attach to documents and routes them to the appropriate approvers.

You can setup individual approval paths for each criterion: one path for the department (your supervisor and department head – based on your default department) and one for the item (the IT department – based on the item's NIGP code) that will route the document automatically to those specific approvers in the order you setup in Buy4Michigan Online.

Maintain Approval Paths

Approval Path PROC - Procurement

General | Change Order | Misc/Freight | Department/Location | Email | INGP Code | Vendor | Summary

Approval Path ID: PROC
 Organization: AGENCY - Department of Technology Management and Budget
 Description*: Procurement
 Approval Type*: BUDGET - Budget office Approval
 Dollar Range*: 0.00 to 999999999.00
 Status: Inactive

Roles:
☒ Basic Purchasing
☐ Department Access
☐ Inventory User
☐ Accounts Payable

Approval Doc/Doc Sub Types

<input checked="" type="checkbox"/> Requisition	<input type="checkbox"/> Unposted Bid	<input type="checkbox"/> Evaluated Bid	<input checked="" type="checkbox"/> Purchase Order	<input type="checkbox"/> PO Change Order	<input type="checkbox"/> PO Receiving	<input type="checkbox"/> Invoice	<input type="checkbox"/> Credit Memo
<input type="checkbox"/> Inventory	<input type="checkbox"/> Blanket	<input type="checkbox"/> Blanket	<input checked="" type="checkbox"/> Blanket			<input type="checkbox"/> Invoice with Change Order	
<input type="checkbox"/> Demand	<input type="checkbox"/> Contract	<input type="checkbox"/> Contract	<input checked="" type="checkbox"/> Contract			<input type="checkbox"/> Invoice-Regular	
<input type="checkbox"/> Open Market	<input type="checkbox"/> Open Market	<input type="checkbox"/> Open Market	<input checked="" type="checkbox"/> Direct Open Market				
<input type="checkbox"/> RPA			<input checked="" type="checkbox"/> Open Market				
<input type="checkbox"/> Release			<input checked="" type="checkbox"/> RPA				
			<input checked="" type="checkbox"/> Q2B Blanket				
			<input checked="" type="checkbox"/> Release				

Approvers

Approver User	Level	Type	Details
		<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	<input type="checkbox"/>
		<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	
Rao, Shashank	1	<input checked="" type="radio"/> Primary <input type="radio"/> Alternate	<input type="checkbox"/>
Jacobson, Eric	1	<input type="radio"/> Primary <input checked="" type="radio"/> Alternate	<input type="checkbox"/>

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On the General tab of the approval path, you establish the foundation settings for that path, including:


Approval Type - User defined field based on types created in Configure Approval Settings.

Dollar Range - The dollar range for this path

Roles - Designate this path to be attached if a Basic Purchasing user, Department Access user or both create document.

Approval Doc/Doc Sub Types - Select all the types of documents that will apply to this path.

Approvers (Approver User, Level, Type) - Set the approvers, their order (level) and their status (primary/alternate) that will be notified to approve any document this path is attached to.



Approval Paths - Department

Approval Path PROC - Procurement

[General](#)
[Change Order](#)
[Misc/Freight](#)
[Department/Location](#)
[Email](#)
[NIGP Code](#)
[Vendor](#)
[Summary](#)


Approval Path Department List

Department ID	Department Name	Delete
TEST01	Test Department For Install Do Not Establish in Production	<input type="checkbox"/>

Approval Path Location List

Department ID	Department Name	Location ID	Location Name	Delete
There are no locations found for this approval path.				

[Save & Continue](#)
[Add Depts/Locs](#)
[Delete All Depts/Locs](#)
[Reset](#)



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You can establish approval paths for specific departments and locations.

Select the appropriate Department ID (which will select all locations within that department,) or click the Department ID link and select desired locations within that department.

Approval Paths – Custom eMails

Approval Path AY STANDRD - Standard open market or term contract req

General Change Order Department/Location **Email** NIGP Code Summary

Format email to be sent to the approvers for this path

☒ Send Email
☐ Customize Email Content

To: Next Approver

CC:

User ID	User Name	Email	Delete
new		<input checked="" type="checkbox"/>	
new		<input checked="" type="checkbox"/>	

BCC:

User ID	User Name	Email	Delete
new		<input checked="" type="checkbox"/>	
new		<input checked="" type="checkbox"/>	

Subject*

Append Doc ID

Email Message*

Append Standard Text

Append Doc ID

You can customize emails for specific approval paths, using the following settings:

Send Email - Check to initialize email generation to approvers.

Customize Email Content - Check to activate the remaining customization fields on this page.

To/CC/BCC - Set to whom you wish to have an email generated, both carbon copy and blind carbon copy.

Append Doc ID - Automatically append the document's ID to the email title.

Email Message - Append Standard Text - Append standard text (as set in Buy4Michigan's standard text area) to email.

Email Message - Append Doc ID -
 Automatically append the document's ID to the email body.

Approval Paths – NIGP Code

Approval Path AY STANDRD - Search NIGP Codes

General Change Order Department/Location Email **NIGP Code** Summary

Search Using: ALL of the criteria

Category: 25 - School and Library Equipment ...

Search Fields: Class ID Class Description Class Item ID Class Item Description

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10

Result Type: Class


Find It Clear

Select	Class ID	Description
<input type="checkbox"/>	350	FLAGS, FLAG POLES, BANNERS, AND ACCESSORIES
<input type="checkbox"/>	525	LIBRARY AND ARCHIVAL EQUIPMENT, MACHINES, AND SUPPLIES
<input type="checkbox"/>	655	PHOTOGRAPHIC EQUIPMENT AND SUPPLIES (NOT INCLUDING GRAPHIC ARTS, MICROFILM, AND X-RAY)
<input type="checkbox"/>	785	SCHOOL EQUIPMENT AND SUPPLIES
<input type="checkbox"/>	880	VISUAL EDUCATION EQUIPMENT AND SUPPLIES (EXCEPT PROJECTION LAMPS -SEE CLASS 285)
<input type="checkbox"/>	924	EDUCATIONAL SERVICES

You can establish approval paths for specific commodity codes.

Search for the appropriate Class and/or Class Item.

Select the appropriate Class and/or Class Item for the approval path.



Maintain Agency Users

User Maintenance for: Annlyn Porter

User Profile [Edit](#)


Salutation		First Name	Annlyn	Last Name	Porter
Phone	(410)396-4932	E-Mail	annlyn.porter@baltimorecity.gov		
Proxy User		Job Title	Accounting Assistant	Status	Active
Login ID	APORTER				

User Defaults [Edit](#)

Default Shipping Address	Default Billing Address	Contact Requestor
		700 E PATAPSCO AVENUE
		HARGROVE BLDG.
		BALTIMORE, MD 21225
Default Account Code	Default Purchaser	
Default Department	TEST1 - Test1	Default Location
		TEST1 - test1

Purchasing Rules [Edit](#)

Open Market Req Limit	\$0.00	Direct Release/RPA Limit	\$0.00
-----------------------	--------	--------------------------	--------



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User Information area: Record general information about the new user. Fields marked with an asterisk must be completed before the form can be submitted.


User Defaults area: You can establish user defaults, including:

- Enter in a default Organization
- Enter a Default Purchaser for this user.
- Enter a Default Department for this user.

Purchasing Rules area: Enter an Open Market Req Limit and Direct Releases/RPAs Limit. The new user will not be able to create documents that exceed the dollar limits you set in the Purchasing Rules area:

Note: Only a user with the Internal Administrator role can give users access to roles in more than one Organization.

Users with the Organization Administrator role will not be able to give users access to roles outside their Organization.



Maintain Agency Users

Roles*

☐ Vendor Administrator
 ☒ Basic Purchasing
 ☒ Can Open Formal Bids:

☐ Internal Administrator
 ☒ Department Access

Department Access Role Privilege Type:

(A department/location superuser must be a requisitioner)

If Department Access user, set up this user as

☐ User is an Approver
 ☐ Allow PO Receipts for Department Access Role
 ☐ Enable Change Order Creation
 ☐ Enable Direct Open Market

☐ Inquiry
 ☐ Accounts Payable


Accounts Payable Role Privilege Type:

☐ Inventory Administrator
 ☐ All Sites

Add Site Department:

Location:

☐ Inventory User
 ☒ Organization Administrator



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Roles determine what a user is permitted to access and what actions they can perform in Buy4Michigan Online.

There are multiple roles currently available for users in Buy4Michigan Online. Some of these may be used concurrently. For instance, an Agency Administrator may also have a Basic Purchasing role.

Some roles have further customization allowed, such as DA users who can be Approvers or Requestors.

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Maintain Agency Users

User Profile Maintenance for: Administrator System

User Profile

Salutation: Alternate ID:

First Name*: Last Name*:

Phone*: -

Email*:

Proxy User: ☐ Activate Proxy User

Job Title*:

Login ID*: Status*:

Password*: Verify Password*:

The User Profile Maintenance section is the user information.

All fields marked with an asterisk are required.

The Proxy user is for Approvers only. This allows another designated user to approve if they are not available.

The status flag is Active or Inactive. Inactive users cannot log in.

Maintain Agency Users

User Defaults Maintenance for: Administrator System

Organization*

Department, Location and Default Bill-to Address are required if the user has a role of Basic Purchasing, Department Access or Inventory User

Department*

Location*

Default Ship-to Address*

Default Bill-to Address*


Phreddy
100 Main
Austin, TX 78701

Default Account Code*

Default Purchaser*

The User Defaults maintenance section controls the starting information on a document when created.


Please note that the default ship to, bill to, and purchaser are not used if the default department and location have settings for them.



Maintain Agency Users

Purchasing Rules Maintenance for: Administrator System

Open Market Req Limit:	<input type="text" value="0.00"/>	Direct Release/RPA Limit:	<input type="text" value="56000.00"/>	Direct Open Market Limit:	<input type="text" value="0.0"/>
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The User Purchasing Rules maintenance section controls the dollar limit of documents that the user can create.

If the document is more than the user's limit, the document will have a red error and the user cannot submit the document until corrected.



Maintain Agency Users

Roles*

☐ Vendor Administrator
 ☒ Basic Purchasing
 ☒ Can Open Formal Bids:

☐ Internal Administrator
 ☒ Department Access

Department Access Role Privilege Type:

(A department/location superuser must be a requisitioner)

If Department Access user, set up this user as

☐ User is an Approver
 ☐ Allow PO Receipts for Department Access Role
 ☐ Enable Change Order Creation
 ☐ Enable Direct Open Market


☐ Inquiry
 ☐ Accounts Payable

Accounts Payable Role Privilege Type:

☐ Inventory Administrator

☐ Inventory User
 ☒ Organization Administrator

☐ All Sites
 Add Site Department:
 Location:



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The User Roles section determines what roles the user has in Buy4Michigan.

Vendor Administrator – Control over vendor registration and records

Basic Purchasing – Buyer role that does Bids and PO documents.

Internal Administrator – Admin with rights to all of Buy4Michigan

Department Access – End user with requisition and receiving rights.

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Department Access – End user with requisition and receiving rights.

Department Access Role Type – Superusers can take control of another user's document if necessary


Set up as – Requisitioner or Contract Shopper. Contract Shopper only does releases

User is an approver – Makes user eligible to be on approval paths

Allow PO Receipts – Allows user to enter in Receipt documents

Enable Change Order Creation – For Open Market PO.

Direct Open Market – Create and send PO



Maintain Agency Users

Roles*

☐ Vendor Administrator
 ☒ Basic Purchasing
 ☒ Can Open Formal Bids:

☐ Internal Administrator
 ☒ Department Access

Department Access Role Privilege Type:

(A department/location superuser must be a requisitioner)

If Department Access user, set up this user as


☐ User is an Approver
 ☐ Allow PO Receipts for Department Access Role
 ☐ Enable Change Order Creation
 ☐ Enable Direct Open Market

☐ Inquiry
 ☐ Accounts Payable

Accounts Payable Role Privilege Type:

☐ Inventory Administrator
 ☐ Inventory User
 ☒ Organization Administrator

☐ All Sites
 Add Site Department:
 Location:



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Inquiry – Read only access to the system for auditing or reporting

Accounts Payable – Invoice processing

Inventory Administrator – Maintain and edit stock items

Inventory user – perform inventory transactions such as issues

Organization Administrator – User has rights to edit departments, locations, users, and approval paths for an organization



Configure Document and Accounting Settings

This section is used to configure document and accounting settings.

Configure Event Types

This section is used to configure event types



Maintain Catalog

This section is used to maintain catalogs

Configure Custom Column Support

This section is used to configure custom field support



The next tab is the Document Settings tab. This tab controls specific options for the different document types within Buy4Michigan.

Configure Document & Accounting Settings

Configure Document and Accounting Settings

Accounting
Documents

Account Input Format:
STANDARD

Accounts Required for Non Charge Items:
☐

Verify Account Code:
☐

Account Code Dollar Ignored Allowed:
☒

Offset Account Enabled:
☐

Extended Accounting On:
☐

Validate Zero Amount Document Account:
☐

Max Account Lines:
0

Accounts Required:
☐

Require Accounting After Date:

Account Code Ignored Allowed:
☒

Update Account Master Dollars:
☐

Display Accounting Warnings:
☐

Accrual Accounting Basis:
Modified

Account Code Verification Mask:

Account Code Budget & Balance Mask:

Account Code Delimiter*:

Ignore Fiscal Year:
☐

Ignore Fiscal Year:
☐

Account Code Mask Legend

= Represents an entire accounting segment unmodified.
* = A wildcard that represents one to many characters. If the asterisk is the last character in the mask, it will match any account code that has the same format to that point. If the asterisk is followed by a delimiter, the mask will match anything to the delimiter. An asterisk or wildcard should never be directly followed by a pound symbol.
? = Represents the account code delimiter.
Selecting the Ignore Fiscal Year checkbox for a mask causes the fiscal year to be ignored when performing accounting operations.

Save & Continue
Save & Exit
Exit

Accounts will not be configured in Phase I. These options will be covered in Phase II.

Buy4Michigan

Configure Document & Accounting Settings

Configure Document and Accounting Settings

Accounting Documents

All Documents Edit

Fixed Asset Enabled: ☐ Fixed Asset Dollar Threshold: 0.00

Required By Date is Required: ☐ Allow Users to Add Vendor Addresses:

Requisition: ☐ Purchase Order: ☐ Bids: ☐ Department Access: ☐ Basic Purchasing: ☐

Enable P-Card support: ☐ Action When Cancel Req Item From PO or Bid: None

Allow Update Fiscal Year: ☐ Allow Negative Document Line Item: ☐

Document Item Class Code Required: ☐ Validate Accounting with Document Item Class Code: ☐

Account Segment Validation For NIGP Code: Account Segment Validation For Department:

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Required By Date is Required

If enabled on a document type basis, required date on General tab becomes a required field.

Allow Users to Add Vendor Addresses

If enabled, allows DA or BP users on documents to add vendor addresses while on documents.

Allow Users to Add Vendor Addresses

If enabled, allows DA or BP users on documents to add vendor addresses while on documents.

Enable P-Card support

For use with your organization's P-Cards, if P-Cards are used.

Allow Update Fiscal Year

If enabled, during Fiscal Year roll user can use account codes from any year available.

Allow Negative Document Line Item

If turned on, a line item on a document may have a negative amount. Can be used by clients only if their interface/accounting system will allow this to occur.

Document Item Class Code Required

Checking this requires Item Class Codes to be entered on BuySpeed Documents such as Requisition, PO, Bid, etc.

Validate Accounting with Document Item Class Code

Validates accounting with Item Class Code using one of the two options below.

Account Segment Validation for NIGP Code

If using modular accounting, select from the dropdown list the segment of the account code to be referenced.

Account Segment Validation for Department

If using modular accounting, select from the dropdown list the segment of the account code to be referenced.

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Configure Document & Accounting Settings

Bids

Bid Item Single Award Only:

☐

Enable Restriction of Formal Bid opening to identified users:

☐

Formal Bid Threshold Exceed Notification Email:

Bid Security and Buyer Supervisor Enabled:

☐

Allow Individual Bid Override System Item Award Setting:

☐

Formal Bid Threshold:

Purchase Orders

Enable DA User Initiated PO Change Orders:

☒

Automatically Send Direct Release POs:

☐

Allow Account Code Changes on Change Orders:

☐

Enable P-Card support:

☐

Enable Vendor Terms after PO has been Sent:

☐

Suppress Vendor Notifications for Direct Release POs:

☐

Suppress P-Card Encumbrance:

☐

Bid Item Single Award Only

Force bid items to be awarded to a single vendor only.

Allow Individual Bid Override Single Item Award Setting

Allows users to override the Bid Item Single Award Only setting.

Enable Restriction of Formal Bid opening to identified users

This option allows the agency to set that only authorized buyers are allowed to open formal bids that are over the formal bid threshold. (Authorized users are set on each user profile: See maintaining users)

Formal Bid Threshold


The dollar threshold over which bids must be posted for bid. When you use a dollar threshold here, users will be prompted with a message about creating a bid any time they enter a bid in BuySpeed with an estimated dollar amount over this value. If dollar value is not a criterion for posting bids electronically, leave this field blank.

Formal Bid Threshold Exceed Notification Email

When a requisition exceeds the bid threshold, the email address in this box will be notified.

Bid Security and Buyer Supervisor Enabled

If not enabled, BuySpeed will allow all BP users to view and take action on all documents within their organization.



Configure Document & Accounting Settings

Bids Edit

Bid Item Single Award Only: ☐

Enable Restriction of Formal Bid opening to identified users: ☐

Formal Bid Threshold Exceed Notification Email:

Bid Security and Buyer Supervisor Enabled: ☐

Allow Individual Bid Override System Item Award Setting: ☐

Formal Bid Threshold:

Purchase Orders Edit

Enable DA User Initiated PO Change Orders: ☒

Automatically Send Direct Release POs: ☐


Allow Account Code Changes on Change Orders: ☐

Enable P-Card support: ☐

Enable Vendor Terms after PO has been Sent: ☐

Suppress Vendor Notifications for Direct Release POs: ☐

Suppress P-Card Encumbrance: ☐



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Enable DA User Initiated PO Change Orders

Option to allow DA users to initiate change orders.

Enable Vendor Terms after PO is Sent

If enabled, BP users can change the vendor terms on the Vendor tab of the purchase order.

Automatically Send Direct Release PO

Check this to have Direct Releases go to Sent status upon final approval.

Suppress Vendor Notifications for Direct Release PO

Check this to have no notifications be generated when Direct Releases are Sent.

Allow Account Code Changes on Change Orders


For clients who cannot allow account code changes due to accounting interface, this option should be deselected.

Enable P-Card support

This will allow for P-Card support of a purchase order.

Suppress P-Card Encumbrance


This will prevent encumbrance processing for the document.



Configure Event Types

Maintain Event Types

Event Description	Event Type	Event Days Before Event	Event Dollars	Based On	Delete
<input style="width: 100%;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text"/>	<input type="checkbox"/>
Notice	Dollars	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text" value="1000"/>	Dollars	<input type="checkbox"/>
renewal	Days	<input style="width: 50px;" type="text" value="3"/>	<input style="width: 50px;" type="text" value="0"/>	Expiration Date	<input type="checkbox"/>



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BuySpeed has an event-tracking system that reminds you when documents reach certain milestones. To take advantage of event tracking, you must define milestones, or events, by which you wish to track your documents. For example, you might wish to have contracts appear on your home page when they are within 30 days of their renewal date.

Event Description

Description

Event Type

Select if the event is based on dollar amount remaining or days

Event Days before Event

Enter in number of days before expiration date to notify

Event Dollars

Dollar Amount to notify on if dollars spent on master document is within limit.

Based on

Event can be based on Dollars, Expiration Date or PO Date

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Maintain Catalogs

Maintain Catalogs

Catalog ID

Description

Group Type

Effective Date

Expiration Date

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Catalogs allow the agency to group like master blankets and contracts together to make the ordering process easier for the end user. For example if two contracts existed for copy paper, they could be grouped under a Paper catalog or Office Supply catalog. The end user would then choose the catalog to see all available items.

For example, all office supply contracts could be grouped into the Office Supply Catalog. Rather than the user needing to know the vendors or Master #, using the catalog will allow them to see all items.

To add a new catalog, click new. To edit an existing catalog, click the Catalog ID link on the left.

- Catalog ID – Short ID
- Description – What is contained in the Catalog
- Group Type – Blanket or Contract
- Effective and Expiration Dates – Starting/Ending Dates; If the catalogs all have the same date, can be used to group.
- Organization Display - If the BuySpeed install is multi organization enabled, the administrator can set the organization types that can see the news item. To set up Organization Types, See Maintain Organization Types.

Define Custom Column

Column ID:	TEST	Column Label:	REQ
Column Description:	TEST		
Document Type:	Requisition	Document Tab:	General
Data Type:	String	Column Dependency:	Requisition Received Solicitation Draft Completed Customer Review
Status:	Active		
Required:	<input type="checkbox"/>		
Show To Agency:	<input checked="" type="checkbox"/>		
Show To Vendor:	<input type="checkbox"/>		
Created by:	Administrator System	Date Created:	07/20/2009
User Last Updated:	Administrator System	Date Last Updated:	07/20/2009

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Clicking “Configure Custom Column Support” will display the “Maintain Custom Columns” screen, which lists any existing custom columns previously defined within Buy4Michigan, as well as provides the option to “Add New Custom Field”.

Clicking “Add New Custom Field” will display the “Define Custom Column” screen

- Column ID* - ID of the field; Each custom column must have a unique ID
- Column Label* - Label of the field on BSO documents; If data entered into this custom column is meant to carry over to other documents, users might consider keeping the Column Label field identical for each custom column
- Column Description - Description of the new custom column
- Document Type - BSO document the column is to appear on (Bid, Receipt, Invoice, PO, Quote, Requisition, Stock)
- Document Tab - Sets if Column is to appear on General tab or Item tab of the document designated
- Data Type - Data allowed to be entered within custom column (Boolean, String, Numeric, List, Integer, or Date/Time Stamp) NOTE: List data type will render a defined list of options to select from for the document and tab

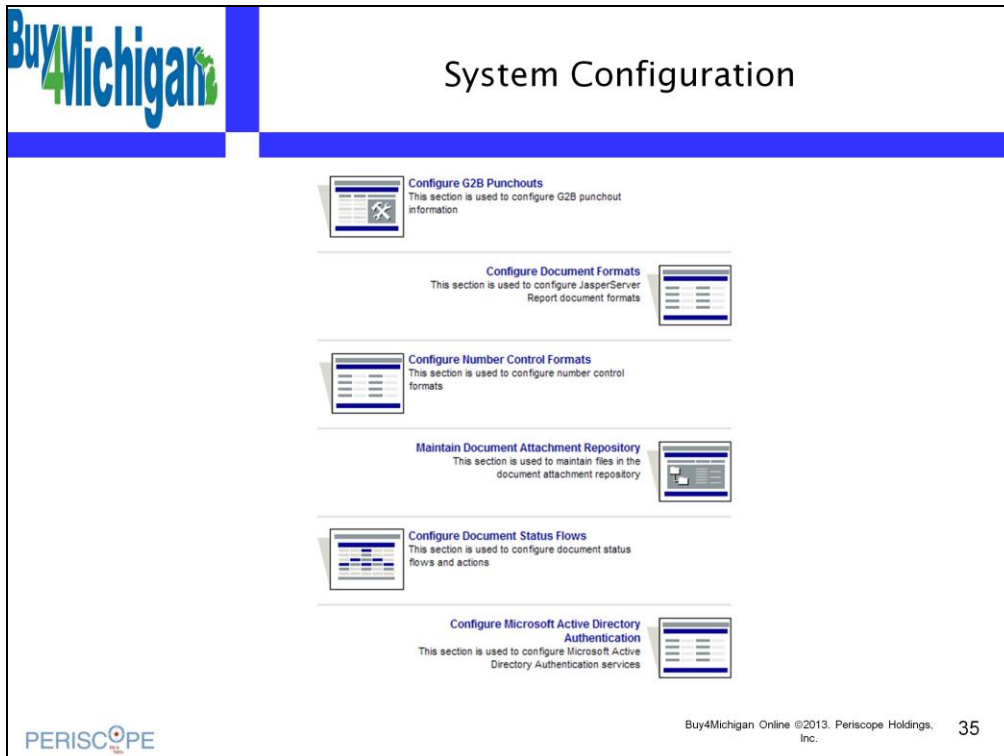
displayed on. Labels and values must be defined for a List and saved. Additionally, order of display in list is controlled by 'Up' and 'Down' options.

Define Custom Column

Column ID:	TEST	Column Label:	REQ
Column Description:	TEST		
Document Type:	Requisition	Document Tab:	General
Data Type:	String		
Status:	Active		
Required:	<input type="checkbox"/>	Column Dependency:	Requisition Received Solicitation Draft Completed Customer Review
Show To Agency:	<input checked="" type="checkbox"/>		
Show To Vendor:	<input type="checkbox"/>		
Created by:	Administrator System	Date Created:	07/20/2009
User Last Updated:	Administrator System	Date Last Updated:	07/20/2009


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- Status - Sets the column as active or inactive
- Required - Sets whether column is a required field
- Column Dependency - Custom column ID for another document type that data from this custom column will convert to when status of the document changes; Multiple custom columns may be selected here, which is useful for documents that may convert to different document types (i.e. A requisition may be converted to a bid or a PO)
- Show To Agency - Determines whether column is shown onscreen to agency users or only on backend; This is useful during the setup process so that agency administrators can confirm that the custom column is functioning properly before displaying to users.
- Show To Vendor - Determines whether column is shown to vendor
- Organization Display (Multi Organization BuySpeed Only) - If the BuySpeed install is multi organization enabled, the administrator can set the organization types that can see the news item. To set up Organization Types, See Maintain Organization Types.




The System Configuration tab controls items in Buy4Michigan that are used throughout the system.

This screen contains settings documented and under configuration management based on the Software Configuration Plan, and *should not be modified* without attaining approval and obtaining documentation as appropriate.





Maintenance Tables



Maintain Accounts
This section is used to add and maintain account codes in a BSO Baseline install


Maintain Address Codes
This section is used to configure address codes for use in BSO







Maintain Commodity Codes
This section is used to maintain commodity codes

Maintain Country Codes
This section is used to maintain country codes





Maintain State Codes
This section is used to maintain state codes



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The Maintenance Tables tab is for setup of different types of data used by Buy4Michigan. This ranges from the country codes for addresses to the payment and shipping terms. Instructions on setup of these screens are available in the Internal Administrator User Manual.

This screen contains settings documented and under configuration management based on the Software Configuration Plan, and *should not be modified* without attaining approval and obtaining documentation as appropriate.

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